Cisco Enterprise Mobility Landscape Survey 2015

New Insights into Approaches to Mobility
Mid-market and Enterprise Results

August 2015

About Cisco's 2015 Mobility Landscape Survey

Provides new insights into how mobility is being approached by mid-market and enterprise organizations globally

Specific objectives include:

- Discovering insights into current strategy and future plans
- Identifying priority mobility initiatives and top challenges
- Learning how IT and Business leaders' views, priorities and objectives align and differ
- Building a global and local view from over 1400 respondents across 14 countries in every geography

Summary of Findings

Motivations for Mobility
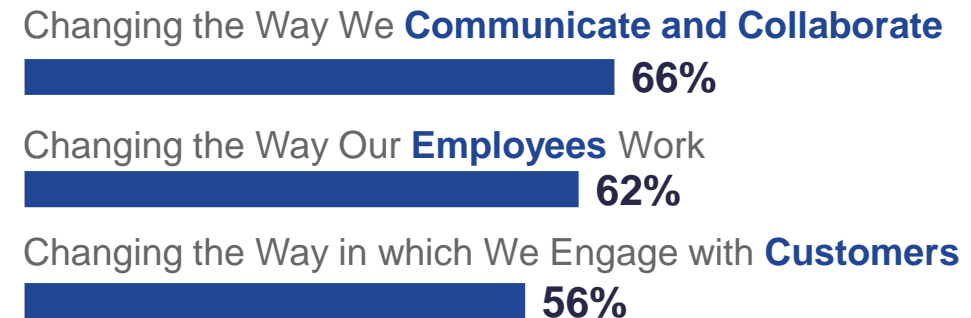
69% Strongly Agree/Agree

"Over the Next 10 Years, **Mobility** Will Impact Our Organization as Much as the **World Wide Web** Has over the Last 20 Years"

78% Agree

Mobility Is a Strategic Imperative for Our Organization's Success

Mobile Devices and Applications Are…

Changing the Way We **Communicate and Collaborate**
66%

Changing the Way Our **Employees** Work
62%

Changing the Way in which We Engage with **Customers**
56%

(Question only asked among LOBs)

L3.   To what extent do you agree or disagree that the following statements represent your organization? Base - All: LOB (728)
C1.   To what extent do you *agree* or *disagree* that the following statements represent your organization's view of mobility? Base - All: Total (1420); ITDM (692); LOB (728)
L1.   What effects are the implementation of mobile devices and applications having on your organization? Base - All: LOB (728)

How Do You Define Mobility…
Is It a Bird, Is It a Plane, Is It…?

Mobility…

% Strongly Agree/Agree

50% 60% 70% 80% 90%

Enables Employees to Work Anywhere, Anytime on Any Device
79 83 86B

Provides New Opportunities for Us to Improve Employee Productivity
79 82 85B

Provides New Ways of Engaging with Customers
78 80 83B

Provides New Ways of Engaging with Our Partners and Suppliers
76 78 80B

Is a Strategic Imperative for Our Organization's Success
74 78 82B

Offers New Revenue Streams by Providing Customers Value-Added Access and Services
68 71 75B

Is Managing Our Mobile Environments with Enterprise Mobility Management (EMM)
60 67 75B

(B) – LOB   **Total**   **(A) – ITDM**

C1.   To what extent do you *agree or disagree* that the following statements represent your organization's view of mobility?
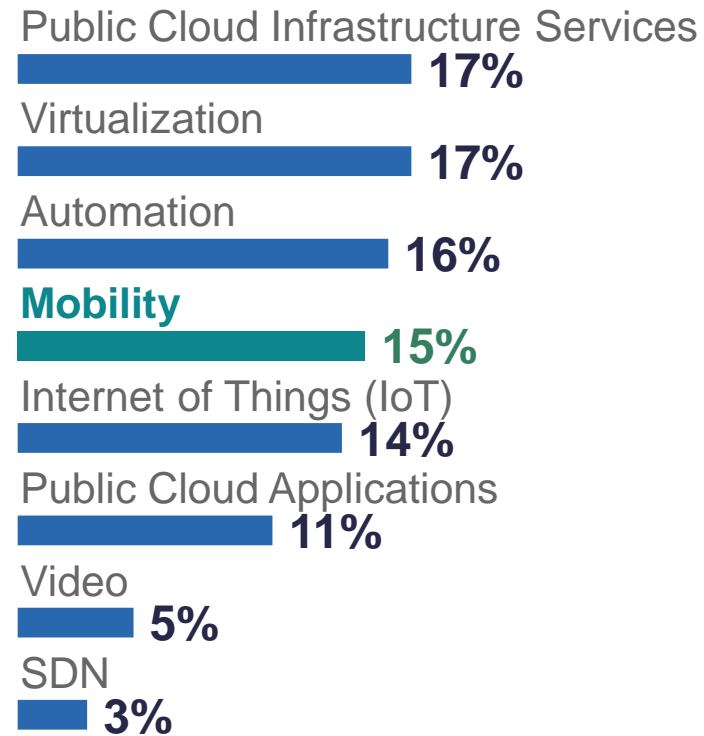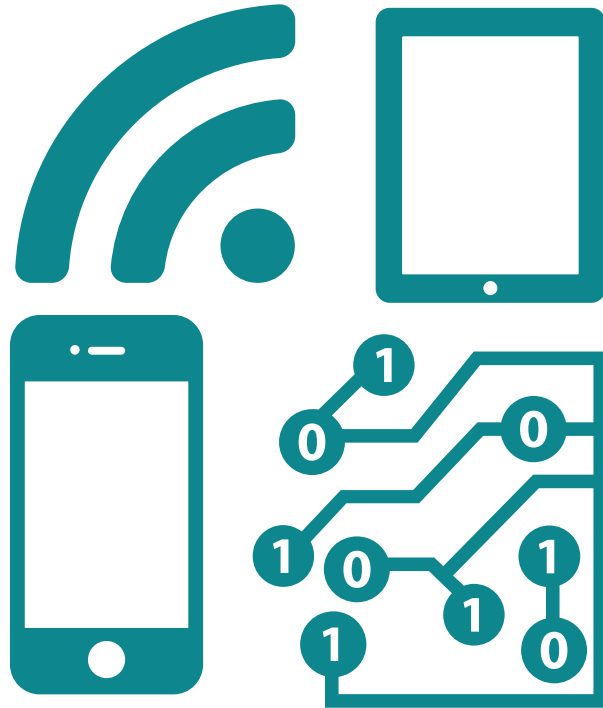
AB – Significantly different at the 95% confidence level
Base – All: Total (1420); ITDM (692); LOB (728)

Mobility Impact over Next Three Years…
As Big as Cloud, Automation and IoT

Technologies that Will Have the Greatest Impact over Next Three Years

Public Cloud Infrastructure Services — **17%**

Virtualization — **17%**

Automation — **16%**

Mobility — **15%**

Internet of Things (IoT) — **14%**

Public Cloud Applications — **11%**

Video — **5%**

SDN — **3%**

IT9.   Now we would like to know which of the following technologies will have the greatest impact on your organization's IT infrastructure over the next three years. To do this, please rank your top three technologies, where "1" is the "technology having the greatest impact", a "2" is the "technology having the second greatest impact", and a "3" is the "technology having the third greatest impact."

Mobility Strategy—Do You Have One?

49% Specific Mobility Initiatives in Place, but No Strategy

13% Invested in Mobile Tech, but No Specific Initiative or Strategy

37% Organization-Wide Mobility Strategy

ITDM: 49%
LOB: 25%

Most Mobility Initiatives Are Still Fragmented

Almost Two-Thirds of Companies *Do Not* Have an Organization-Wide Mobility Strategy
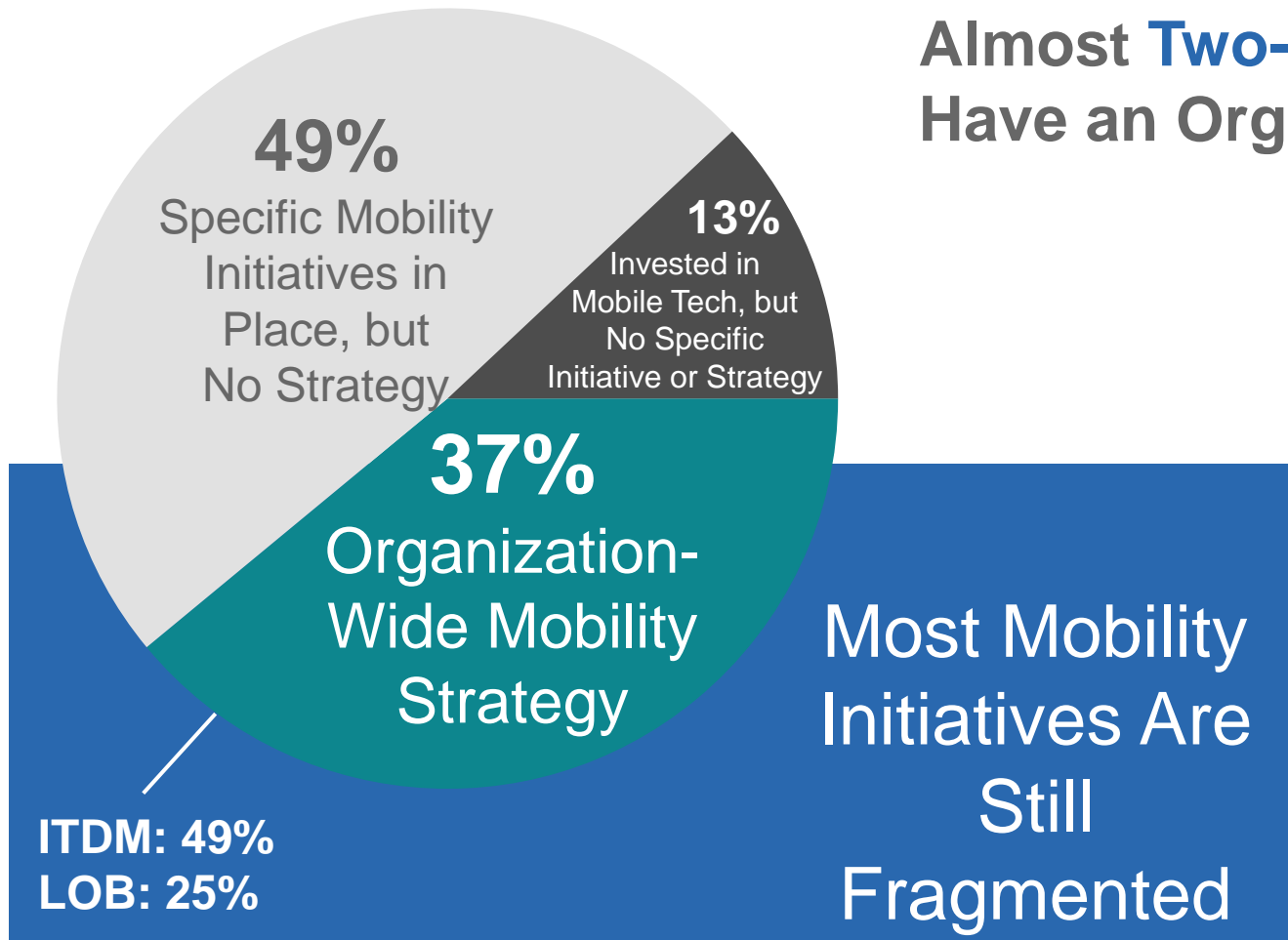
- Why do IT and Business Leaders have such divergent views?

- Can a Digital Enterprise succeed without a comprehensive mobility strategy?

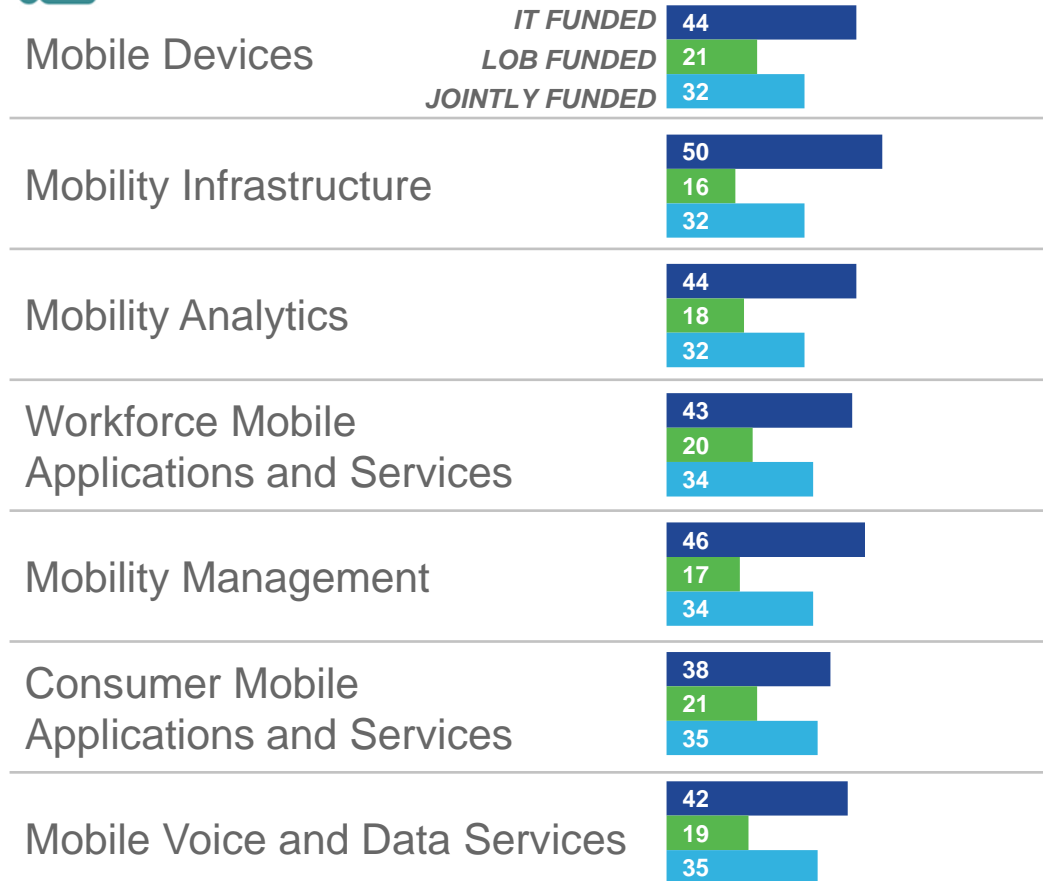- What are the biggest obstacles to creating a strategy?

C2.   Which of the following statements best describes your organization's approach to supporting mobility?

Base – All: Total (1420); ITDM (692); LOB (728)

Mobility Decision Making—IT, LOB, Both?

Four-Fifths still IT or Jointly Funded

Mobile Devices
- IT FUNDED: 44
- LOB FUNDED: 21
- JOINTLY FUNDED: 32

Mobility Infrastructure
- 50
- 16
- 32

Mobility Analytics
- 44
- 18
- 32

Workforce Mobile Applications and Services
- 43
- 20
- 34

Mobility Management
- 46
- 17
- 34

Consumer Mobile Applications and Services
- 38
- 21
- 35

Mobile Voice and Data Services
- 42
- 19
- 35

Only 22% of Business Leaders Believe They Are Always Consulted?

22% Always Consulted on Mobility Initiatives

42% Sometimes

29% Occasionally

5% Rarely/Never

(Question only asked among LOBs)

C8.   Thinking about the following mobility technologies in your organization, are they typically IT funded, Line of Business (LOB) funded, or jointly funded? Base – All: Total (1420); ITDM (692); LOB (728)
L5.   How often are business leaders within your organization consulted on the requirements for mobility initiatives? Base - All: LOB (728)

Business Leaders' Views of Mobility...
See Positive Benefits Including Improved Work Flow, Operations, Service...

Where Is Mobility Having the Greatest Impact?

Employee Workflow
33%

Internal Business Operations and Workflows
31%

Customer Service
30%

Business Communications
28%

Customer Engagement
26%

Sales Processes
20%

Marketing, Advertising and Promotions
16%

Supply Chain Management
14%

% Strongly Agree/Agree

Over the Next 10 Years, Mobility Will Impact Our Organization as Much as the World Wide Web Has Over the Last 20 Years
69%

Our IT Department Is Able to Deliver the Mobility Services We Need to Be Successful
62%

Our Line of Business Is Able to Accurately Quantify the Success and ROI Of Mobility-Related Projects
50%

Given the Choice, I Would Prefer to Source My Mobility Services without IT Intervention
36%

L2. Where in your organization is mobility having the greatest impact?
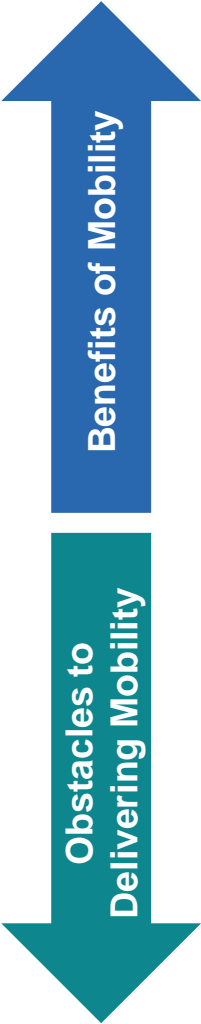L3. To what extent do you agree or disagree that the following statements represent your organization?

Base – All: LOB (728)

Mobility Benefits and Obstacles…

✓ Top Benefits

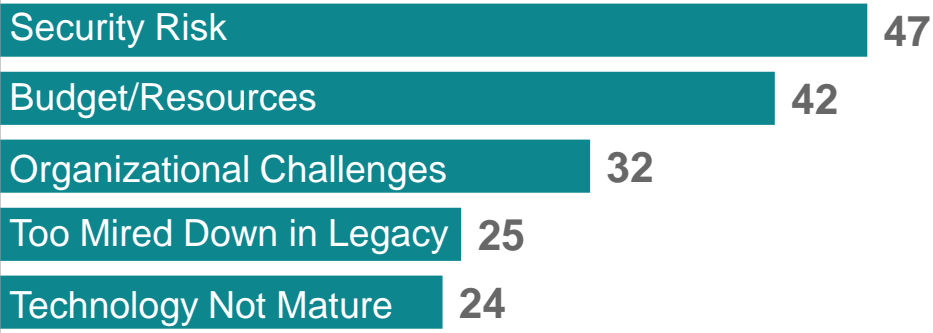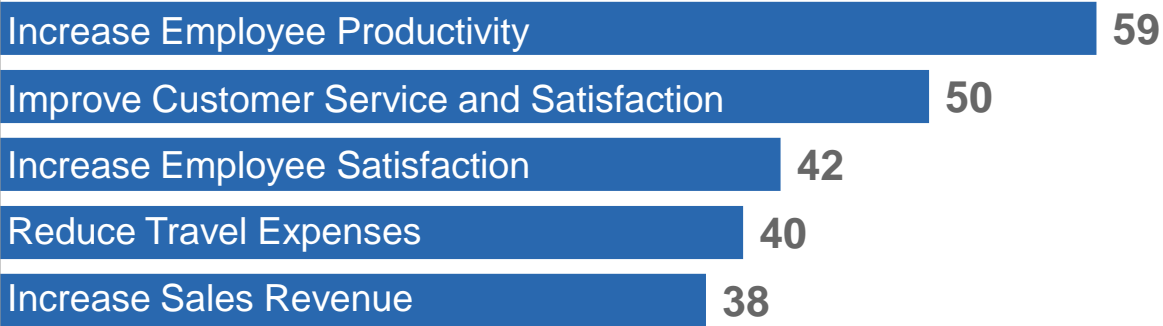**59%** realize or expect **employee productivity** to be top benefit

50% see **customer service and satisfaction** as top benefit

!!! Top Obstacles

Security risks and **budget constraints** feature high

32% view **organizational challenges** as a big issue too

Benefits of Mobility

Benefit	Value
Increase Employee Productivity	59
Improve Customer Service and Satisfaction	50
Increase Employee Satisfaction	42
Reduce Travel Expenses	40
Increase Sales Revenue	38

Obstacles to Delivering Mobility

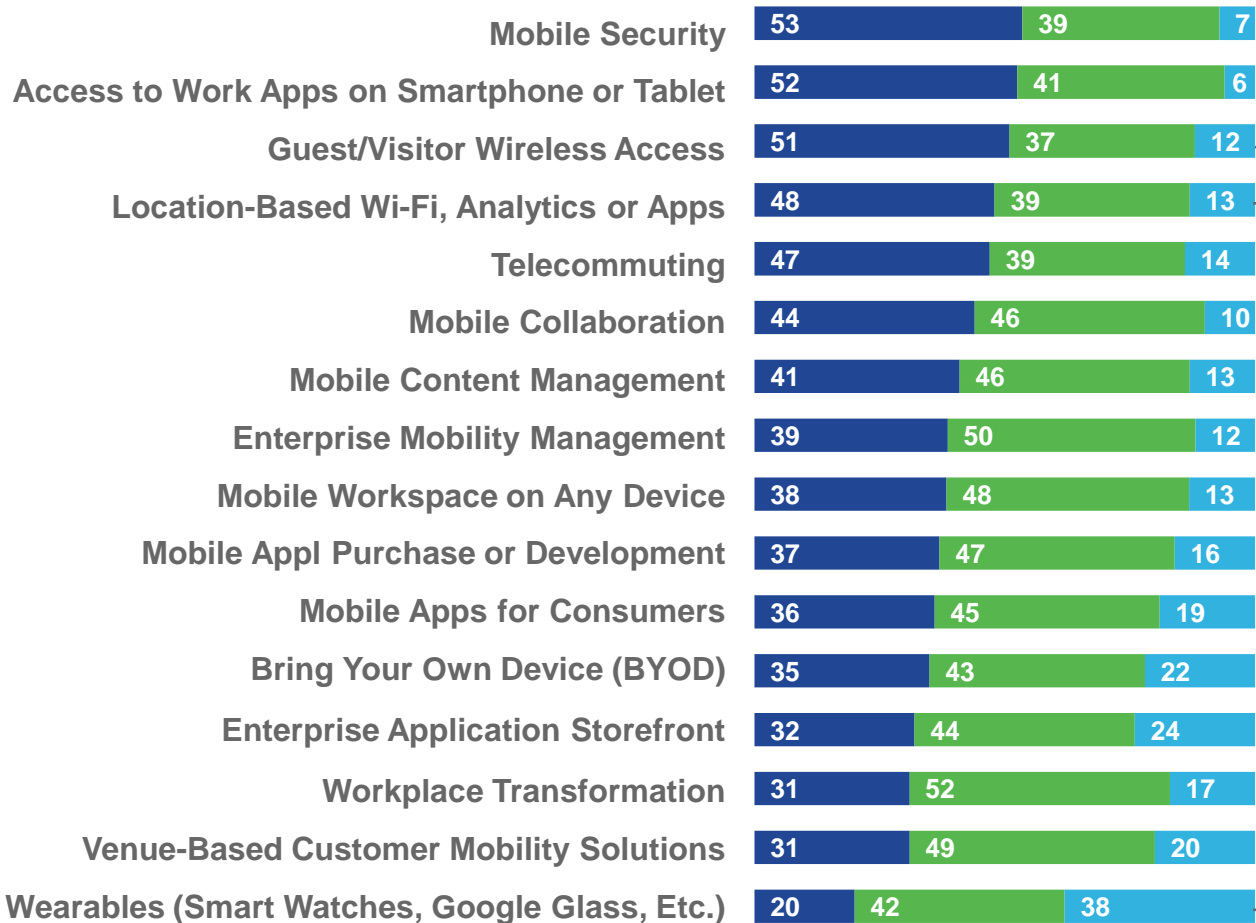| Obstacle	Value
Security Risk	47
Budget/Resources	42
Organizational Challenges	32
Too Mired Down in Legacy	25
Technology Not Mature	24

C4.   Which of the following business benefits has your organization realized or would expect to realize, through implementing its mobility solutions?
C5.   What are the greatest obstacles to your organization being able to deliver the mobility solutions needed for the business to be successful?

Base – All: Total (1420); ITDM (692); LOB (728)

Top Mobility Initiatives

Currently Implemented	**Plan to Implement in the Next 6–12 Months**	**No Plans to Implement**

MOBILITY INITIATIVES

Initiative	Currently Implemented	Plan to Implement	No Plans
Mobile Security	53	39	7
Access to Work Apps on Smartphone or Tablet	52	41	6
Guest/Visitor Wireless Access	51	37	12
Location-Based Wi-Fi, Analytics or Apps	48	39	13
Telecommuting	47	39	14
Mobile Collaboration	44	46	10
Mobile Content Management	41	46	13
Enterprise Mobility Management	39	50	12
Mobile Workspace on Any Device	38	48	13
Mobile Appl Purchase or Development	37	47	16
Mobile Apps for Consumers	36	45	19
Bring Your Own Device (BYOD)	35	43	22
Enterprise Application Storefront	32	44	24
Workplace Transformation	31	52	17
Venue-Based Customer Mobility Solutions	31	49	20
Wearables (Smart Watches, Google Glass, Etc.)	20	42	38

Guest/BYOD

37% still planning guest/visitor access—51% already deployed

43% still planning BYOD—35% already deployed

Location-Based Services

87% use/plan to use Wi-Fi-based LBS, spread across a variety of initiatives

Cost and privacy are **biggest challenges with LBS**

"Wearables" Are Emerging Quickly

62% are deploying or planning wearables in the workforce

S7.   Which of the following mobility initiatives has your organization implemented or does your organization plan to implement? Base – All: Total (1420); ITDM (692); LOB (728)
C10.   What challenges have your organization experienced, or would expect to experience, when using Location-Based Services in the workplace? Base - Asked: Total (1282); ITDM (635); LOB (647)
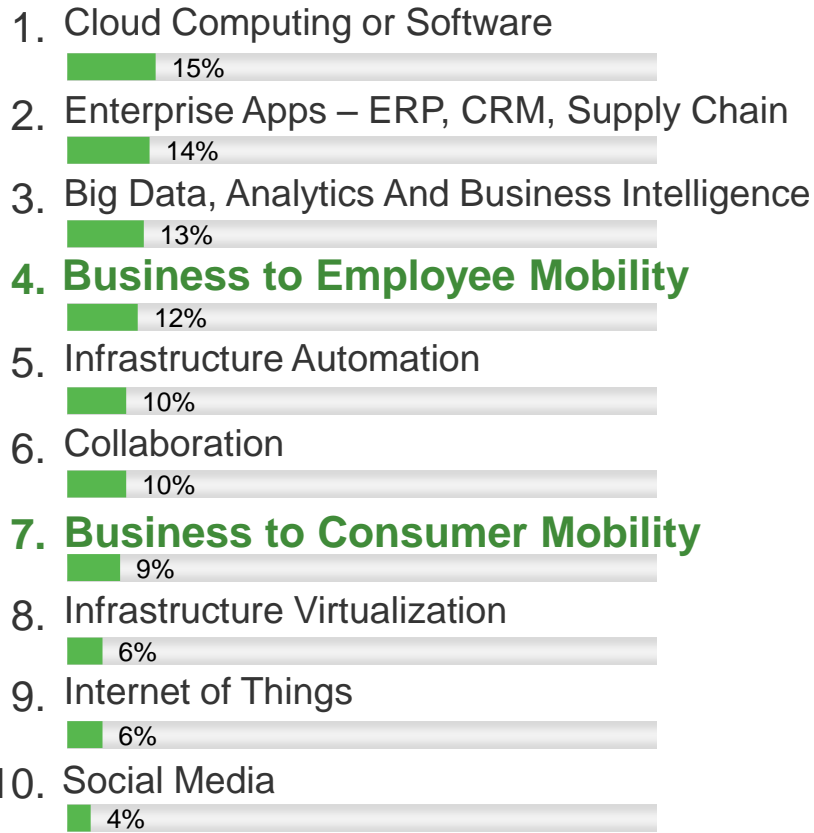
Employee Mobility

B2E and B2C Mobility Both Rate Highly...
Especially with Business Leaders

Technology Top Priorities

TOTAL

1. Cloud Computing or Software
   15%
2. Enterprise Apps – ERP, CRM, Supply Chain
   14%
3. Big Data, Analytics And Business Intelligence
   13%
4. **Business to Employee Mobility**
   12%
5. Infrastructure Automation
   10%
6. Collaboration
   10%
7. **Business to Consumer Mobility**
   9%
8. Infrastructure Virtualization
   6%
9. Internet of Things
   6%
10. Social Media
    4%

(A) - ITDM

1. Cloud Computing or Software
   17%
2. Enterprise Apps – ERP, CRM, Supply Chain
   14%
3. Big Data, Analytics And Business Intelligence
   14%
4. **Business to Employee Mobility**
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   8%
9. Internet of Things
   6%
10. Social Media
    4%

(B) - LOB

1. **Business to Employee Mobility**
   14%
2. Enterprise Apps – ERP, CRM, Supply Chain
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3. Big Data, Analytics And Business Intelligence
   13%
4. Cloud Computing or Software
   12%
5. **Business to Consumer Mobility**
   11%
6. Infrastructure Automation
   11%
7. Collaboration
   10%
8. Internet of Things
   6%
9. Infrastructure Virtualization
   5%
10. Social Media
    4%

C20.   Now we would like to know which of the following are technology priorities for your organization. To do this, please rank the top three technology priorities, where "1" is the "top technology priority", a "2" is the "second highest technology priority", and a "3" is the "third highest technology priority".

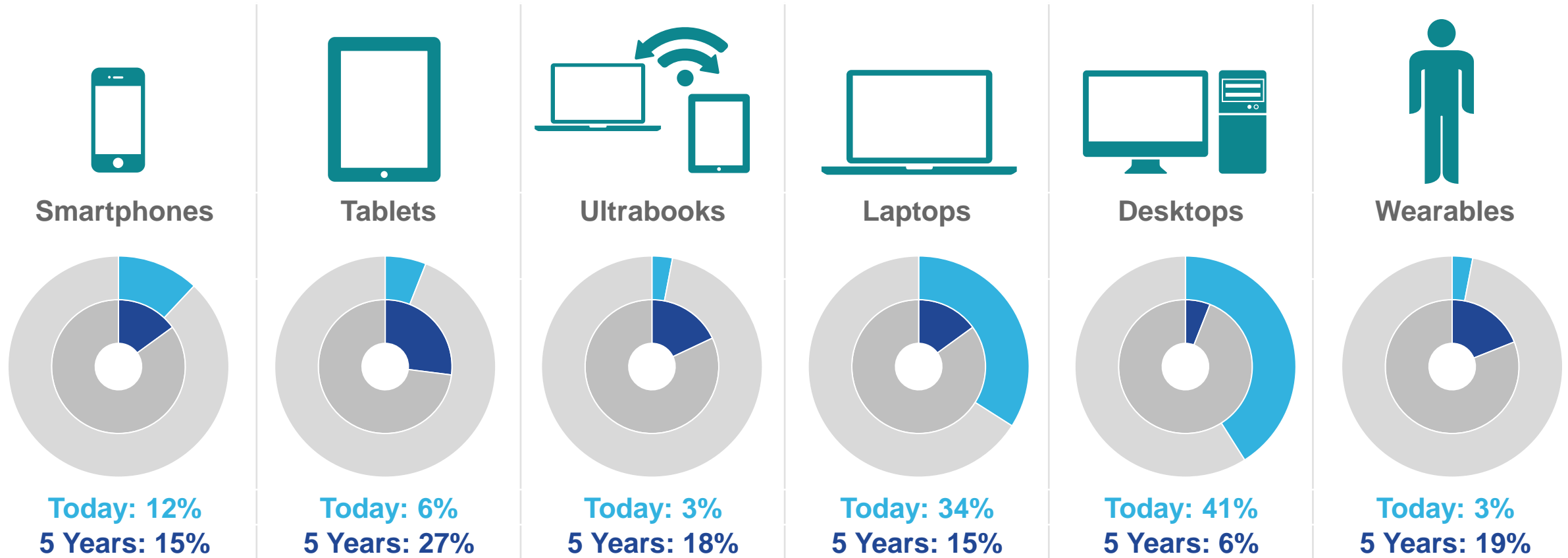Base - All: Total (1420); ITDM (692); LOB (728)

Mobile Devices Taking Over at Work—Fast!

Desktops Expected to Disappear over the Next Five Years…

Primary Work Device Now vs. Five Years from Now…

Smartphones	Tablets	Ultrabooks	Laptops	Desktops	Wearables
Today: 12%	Today: 6%	Today: 3%	Today: 34%	Today: 41%	Today: 3%
5 Years: 15%	5 Years: 27%	5 Years: 18%	5 Years: 15%	5 Years: 6%	5 Years: 19%

L4.   Which of the following is the primary work device used by your organization's employees? What about five years from now?

App Mobility Gap—Still Limited Availability on Mobile
Mobilizing Applications Is a Bottleneck for Many Organizations!

Applications Available

	Office	Laptop	Smartphone	Tablet
Collaboration Applications	69%	68%	41%	31%
Custom Business Applications	70%	59%	30%	23%
Email/Calendar	73%	76%	66%	47%
Enterprise Applications (e.g., CRM, ERP, BI)	71%	67%	28%	25%
Intranet	73%	68%	43%	32%

	Office	Laptop	Smartphone	Tablet
Unified Communications/ IP Telephone/VoIP	67%	51%	44%	25%
Network File Server Access	74%	68%	31%	24%
Productivity Applications	72%	70%	37%	34%
Video Conferencing	68%	64%	34%	29%
Virtualized Desktops	65%	55%	23%	16%

IT1. Which of the following corporate applications or network resources are available to employees at your organization while in the office? And which have you made available to employees on mobile devices?

Base – ITDM (692)

Mobility Consumption Models
Gradual Transition from On-Premise to the Cloud

Cloud and Mobility Deployment

From the Cloud—with *Substantial* IT Support

Organization Deploys Today

TOTAL	IT	LOB
17%	19%	15%

30%	32%	28%

Preferred Method for Future

From the Cloud—with *Little to No* IT Interaction

Organization Deploys Today

TOTAL	IT	LOB
7%	7%	7%

12%	10%	13%

Preferred Method for Future
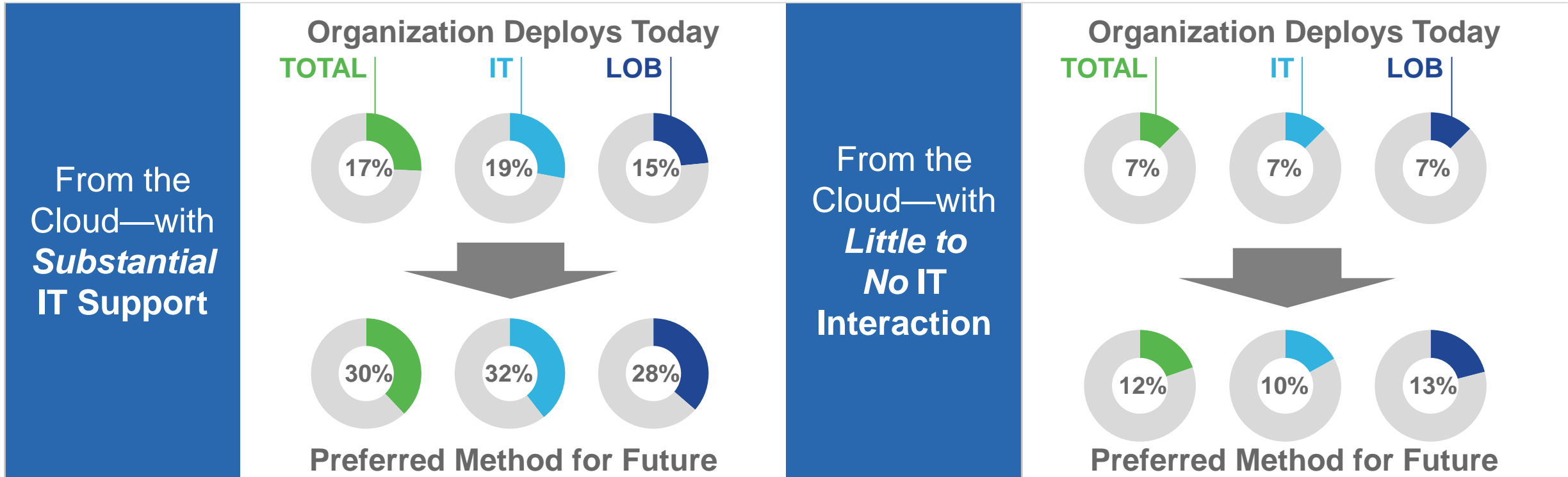
C6. How does your organization deploy technologies that support mobility today?
C7. And how would you prefer your organization deploy technologies that support mobility 24 months from now?

Base – All: Total (1420); ITDM (692); LOB (728)

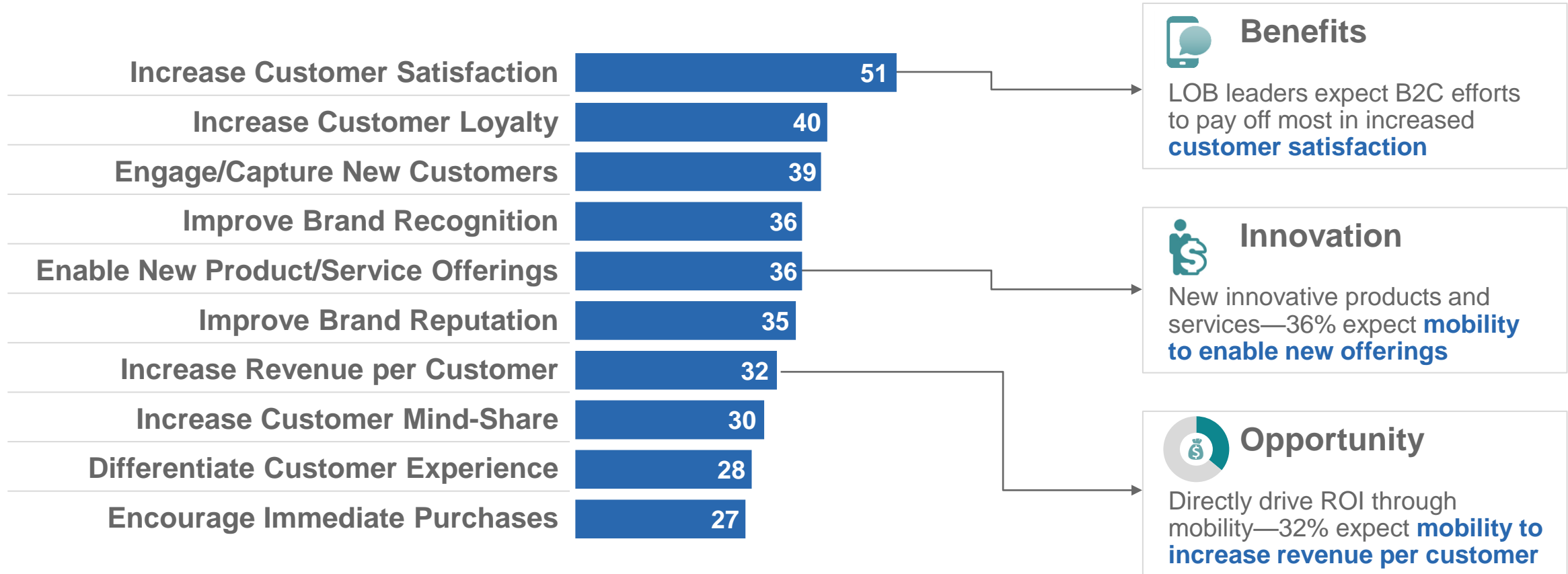# Customer Mobility

Business-to-Consumer (B2C) Mobility…
Stronger Customer Satisfaction Is the Top Benefit

Benefits Expected through B2C Mobility Initiatives

Benefit	Value
Increase Customer Satisfaction	51
Increase Customer Loyalty	40
Engage/Capture New Customers	39
Improve Brand Recognition	36
Enable New Product/Service Offerings	36
Improve Brand Reputation	35
Increase Revenue per Customer	32
Increase Customer Mind-Share	30
Differentiate Customer Experience	28
Encourage Immediate Purchases	27

Benefits

LOB leaders expect B2C efforts to pay off most in increased **customer satisfaction**

Innovation

New innovative products and services—36% expect **mobility to enable new offerings**

Opportunity

Directly drive ROI through mobility—32% expect **mobility to increase revenue per customer**

C12.   Which of the following business benefits has your organization realized or would expect to realize, through its Business-to-Consumer (B2C) mobility initiatives?
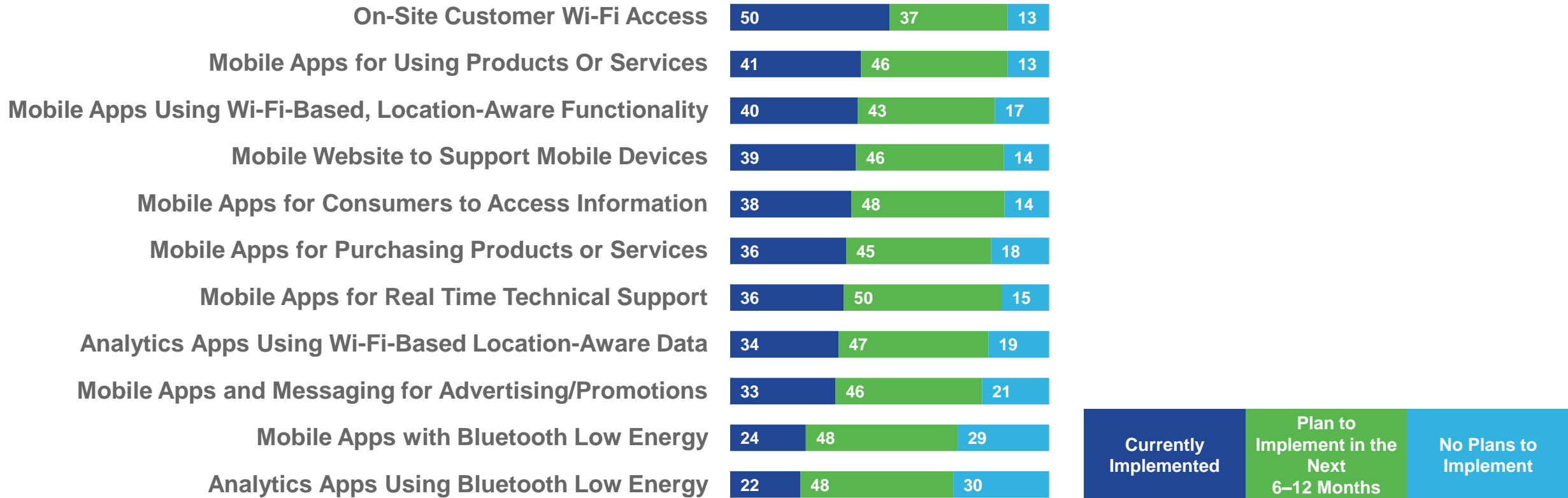
AB – Significantly different at the 95% confidence level
Base – Asked: Total (1378); ITDM (678); LOB (700)

Large Appetite for B2C Mobile Solutions...
Wi-Fi Access, Mobile apps and LBS Lead the Way

B2C Mobile Solutions implemented/planned...

Solution	Currently Implemented	Plan to Implement in the Next 6–12 Months	No Plans to Implement
On-Site Customer Wi-Fi Access	50	37	13
Mobile Apps for Using Products Or Services	41	46	13
Mobile Apps Using Wi-Fi-Based, Location-Aware Functionality	40	43	17
Mobile Website to Support Mobile Devices	39	46	14
Mobile Apps for Consumers to Access Information	38	48	14
Mobile Apps for Purchasing Products or Services	36	45	18
Mobile Apps for Real Time Technical Support	36	50	15
Analytics Apps Using Wi-Fi-Based Location-Aware Data	34	47	19
Mobile Apps and Messaging for Advertising/Promotions	33	46	21
Mobile Apps with Bluetooth Low Energy	24	48	29
Analytics Apps Using Bluetooth Low Energy	22	48	30

C11.   Which of the following Business-to-Consumer (B2C) mobile solutions or functionalities has your organization implemented or does your organization plan to implement to help meet your business objectives as they relate to customers?

AB – Significantly different at the 95% confidence level
Base – All: Total (1420); ITDM (692); LOB (728)

B2C Mobility Challenges:
Security, Privacy, Complexity, Analytics and More…

Challenges Experienced with B2C Mobility Initiatives

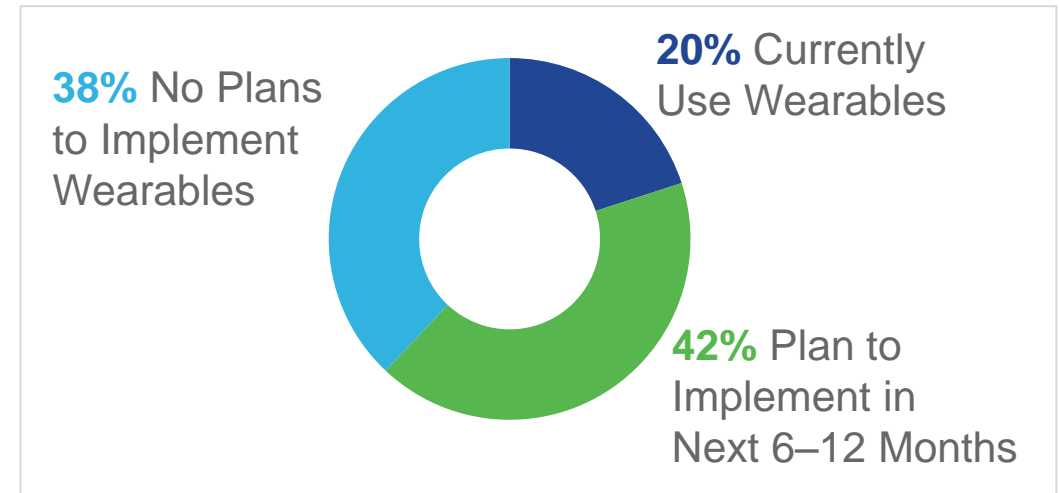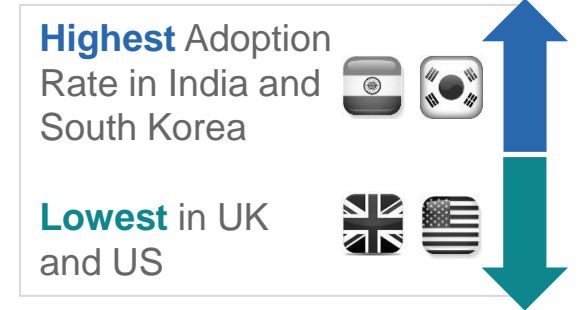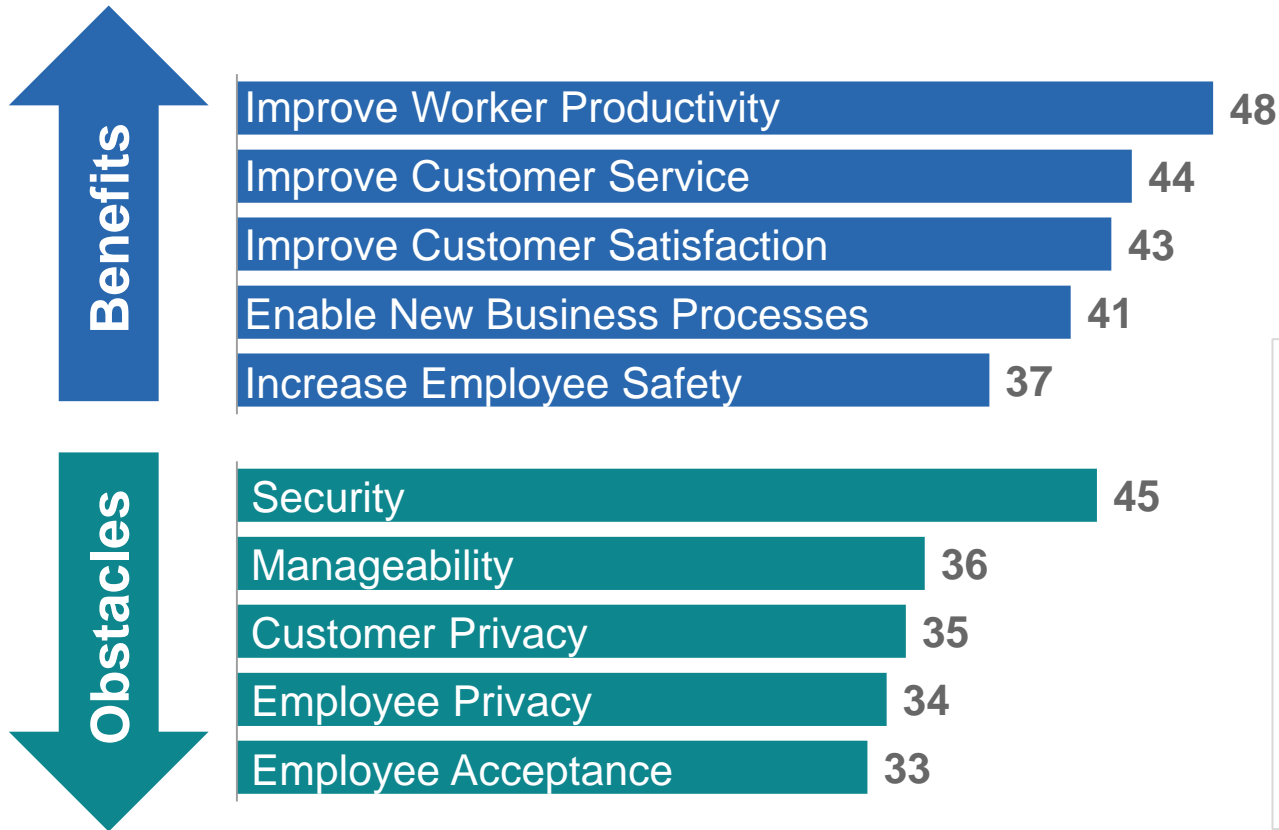| Challenge	Value
Customer Data Security and Privacy	42
Technical Complexity	36
Data Analysis	34
Data Storage	33
Compliance and Regulations	33
Mobile User Experience	31
Bandwidth and Content Delivery	28
Integration with CRM Solutions	26
Data Center Infrastructure Performance for Mobile Commerce	25
Web-Based, Real-Time Communications over Mobile	24

C13.   And, what challenges has your organization experienced, or would expect to experience, when implementing Business-to-Consumer (B2C) mobility initiatives?

Special Mobility Initiatives

Wearables Are Quickly Emerging…
20% Already Use …….But There Are Challenges

Benefits

Improve Worker Productivity	48
Improve Customer Service	44
Improve Customer Satisfaction	43
Enable New Business Processes	41
Increase Employee Safety	37

Obstacles

Security	45
Manageability	36
Customer Privacy	35
Employee Privacy	34
Employee Acceptance	33

Highest Adoption Rate in India and South Korea

Lowest in UK and US

38% No Plans to Implement Wearables

20% Currently Use Wearables

42% Plan to Implement in Next 6–12 Months

S7.   Which of the following mobility initiatives has your organization implemented or does your organization plan to implement?

C17.   Earlier, you indicated that your organization has implemented or is planning to implement the use of wearables. How has your organization benefited or do you expect your organization to benefit from introducing wearables into the work environment?

C18.   And, what challenges have your organization experienced, or would expect to experience, when introducing wearables into the work environment? (Please select all that apply.)
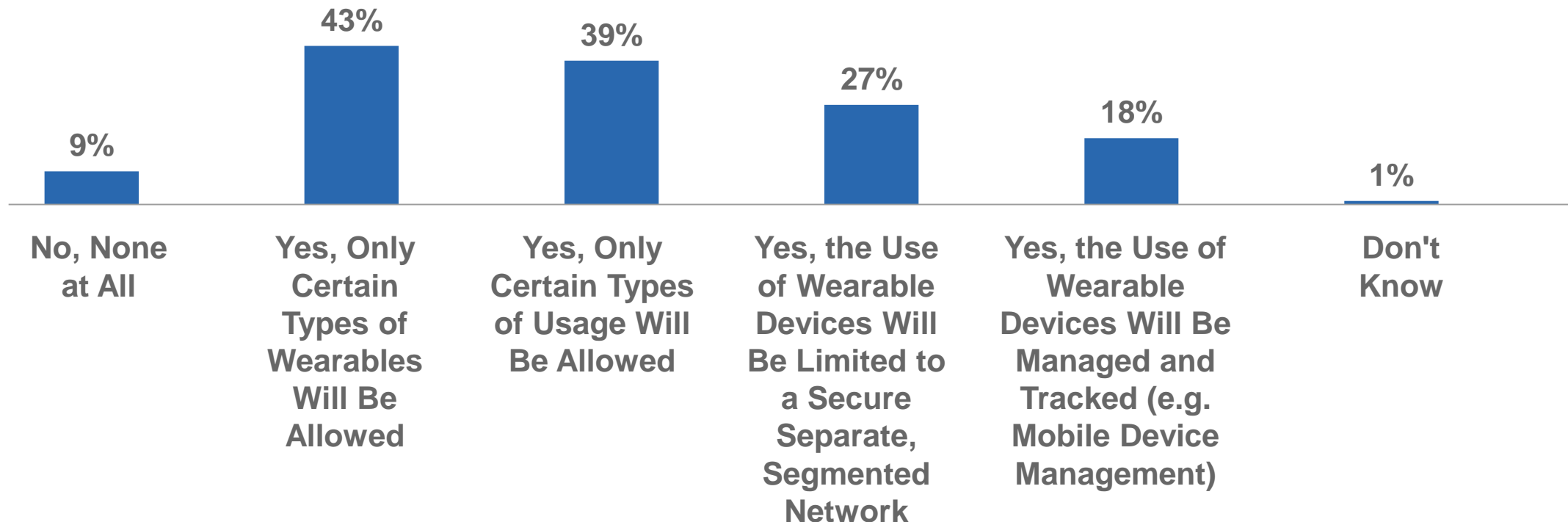
Wearable Devices:
Most IT Leaders Expect Some Level of Control

Control those Wearable Devices !!!

9%	43%	39%	27%	18%	1%
No, None at All	Yes, Only Certain Types of Wearables Will Be Allowed	Yes, Only Certain Types of Usage Will Be Allowed	Yes, the Use of Wearable Devices Will Be Limited to a Secure Separate, Segmented Network	Yes, the Use of Wearable Devices Will Be Managed and Tracked (e.g. Mobile Device Management)	Don't Know

C19. Has, or would you expect your organization to place controls on wearable devices that can access corporate networks or resources?

Base – Asked: ITDM (467); question not asked to LOBs

Workplace Transformation Initiatives…
52% Planning to Implement in Next 6–12 Months !!

Benefits

| Benefit	Value
Cost Savings	46
Improve Employee Productivity	43
Optimize Workspace Utilization	36
Increase Employee Satisfaction	36
Process/Workflow Innovation	34
Increase Product/Service Innovation	32
Create a More Technology-Enabled Collaborative Work Environment	31
Improve Worker Security	29
Retain Top Talent	28
Reduce Physical Office Space	27
Attract Top Talent	24
Reduce Real Estate Costs	22

Workplace Transformation…

Provides organizations with the ability to deliver physical workplace solutions (campus, branch, home) that are designed to meet the challenges of today's work styles, address the needs of a more mobile, diverse and multi-generational workforce and reduce costs

17% No Plans to Implement Workplace Transformation

31% Currently Implementing Workplace Transformation

52% Plan to Implement in Next 6–12 Months
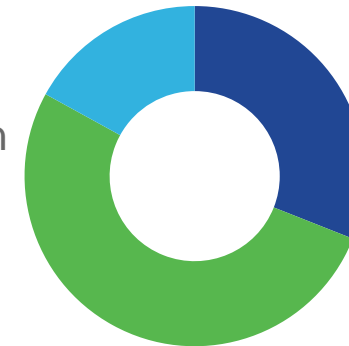
C15.   Earlier, you indicated that your organization has implemented or is planning to implement a Workplace Transformation Initiative. Which of the following benefits has your organization realized or would expect to realize as result? Base – Asked: Total (1179); ITDM (598); LOB (581)
S7.   Which of the following mobility initiatives has your organization implemented or does your organization plan to implement? Base: Total (1420)

Use of Location-Based Services…
Spread Across B2C and B2E Use Cases

Using or Planning to Use Wi-Fi or Bluetooth Enabled Location-Based Services for

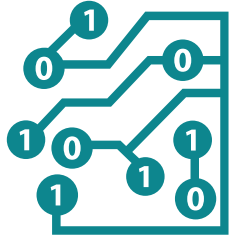| Category	Value
Optimizing Workplace Effectiveness	39
Providing New Services to Customers	34
Providing New Ways of Engaging with Our Customers	31
Improving Employee Security/Emergency Response	31
Providing New Ways of Engaging with Our Partners and Suppliers	30
Locating/Tracking Devices	30
Analyzing Workspace Utilization	27
Improving Employee Retention	27
Locating/Tracking Employees	26
Providing Employees with New Services like Wayfinding	23
Providing Contextual Offers to Customers	23

90% Use/Plan to Use at Least One of These Services

C9.   Is your organization using or planning to use Wi-Fi or Bluetooth enabled location-based services for any of the following?

Base – All: Total (1420); ITDM (692); LOB (728)

85% Are Embracing Gigabit WLAN…

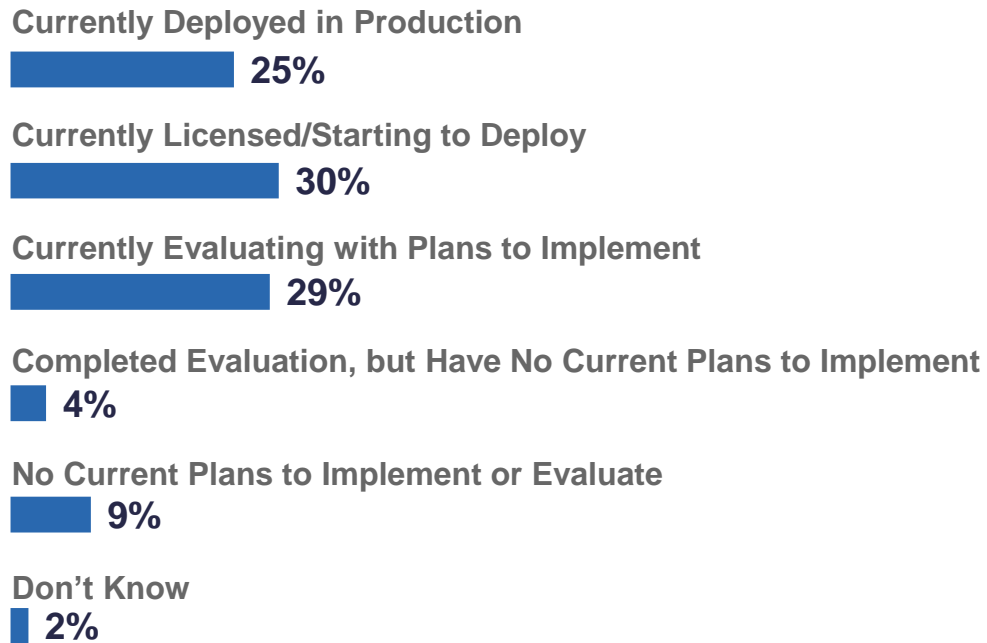## Many Motivations—Collab apps, IoT, Devices, HTML5, LBS, Video

Organization's Gigabit WLAN Implementation

85% Using or Plan to Use

Currently Deployed in Production
25%

Currently Licensed/Starting to Deploy
30%

Currently Evaluating with Plans to Implement
29%

Completed Evaluation, but Have No Current Plans to Implement
4%

No Current Plans to Implement or Evaluate
9%

Don't Know
2%

… and Why Planning to Move

Collaboration Applications
40%

Internet of Things (IoT) Support
38%

Device Density
34%

Media Rich Web/HTML5 Applications
33%

Location-Based Services
32%

Employee Use of .11ac Devices
31%

Video
30%

New Office Buildings
29%

Refurbishing Existing Office Buildings
25%

IT4.   Which of the following best describes your organization's implementation of Gigabit (.11ac) WLAN?
IT5.   Why is your organization moving or planning to move to Gigabit (.11ac) WLAN?

The All-Wireless Access Network…

A Growing Possibility for Many Organizations

Wireless Direction over 12–24 Months

Transitioning toward All-Wireless Access Networks
36%

Will Support Both Wired and Wireless Access Networks for the Foreseeable Future
59%

Will Continue to Only Provide Wired Access to the Network; Wireless Connectivity Is Not and Will Not Be Available for the Foreseeable Future
3%

Don't Know
1%

Reason Not Moving to All-Wireless

Security Concerns
53%

Reliability/Availability Concerns
41%

Performance Concerns
39%

Productivity Concerns
28%

Lack of Budget
28%

Certain Devices that Only Support Wired Connectivity
26%

Installed Base of Wired Access
26%

IT2.   Which statement best describes your organization's wireless direction over the next 12 to 24 months?
IT3.   Why is your organization not moving to an all-wireless deployment?

CISCO
IT2 – Base: ITDM (692)
IT3 – Base: ITDM (434)

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Appendix

Background and Methodology

Objectives

Better insights and visibility into how mobility is impacting businesses (mid-market and enterprise) and their adoption

Specific objectives include:

- Identify where organizations are with their mobility strategy

- Identify mobility priorities and initiatives and how these are supported

- Measure impact and challenges of mobility initiatives on enterprise and collaboration applications

Qualification Criteria

- 50% of respondents are manager-level or above IT Decision Makers (ITDMs) in companies with 100+ employees

- 50% of respondents are manager-level or above Line of Business Decision Makers (LOBs) in companies with 100+ employees

- Must currently have employees who work remotely

- Must have involvement in purchase decisions for mobile solutions, services and devices

- Must have basic mobile access solutions in place (wireless access, VPN access or access to cloud solutions)

Methodology

- 1,400 web-based interviews

- International: 14 countries*

- Approximately 20 minutes in length

- Data collection took place April 8– May 13, 2015**

This Report Includes Results for:

WW (Composite Number)

*Countries included in Study:
Americas: US, Brazil, Mexico
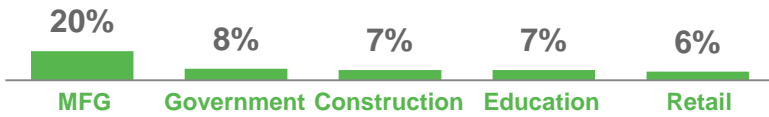EMEAR: UK, Germany, France, Netherlands, Russia
APJC: China, India, Japan, South Korea, Singapore, Australia

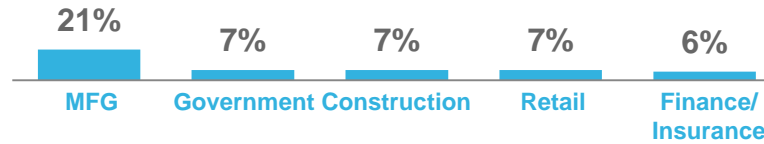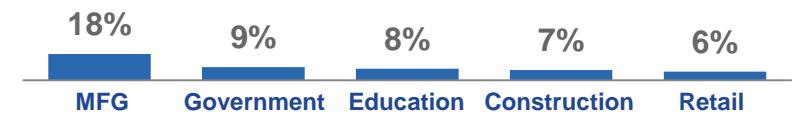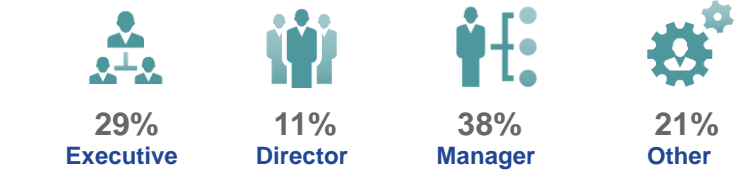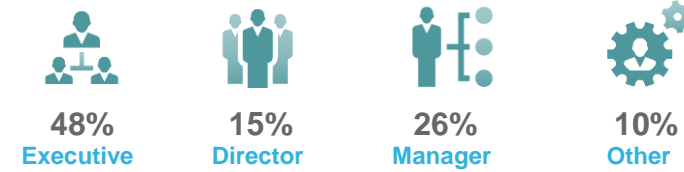**Country field dates noted in speaker notes

Respondent Profile

Total

Industry Top 5
MFG	Government	Construction	Education	Retail
20%	8%	7%	7%	6%

Job Level
Executive	Director	Manager	Other
39%	13%	32%	16%

Company Size
Mid-Market* 40% — Enterprise* 60%

Remote Workers
Very Low (0%–29%)	Low (30%–54%)	Medium (55%–74%)	High (75%–100%)
62%	29%	4%	4%

ITDM

Industry Top 5
MFG	Government	Construction	Retail	Finance/Insurance
21%	7%	7%	7%	6%

Job Level
Executive	Director	Manager	Other
48%	15%	26%	10%

Company Size
Mid-Market* 36% — Enterprise* 64%

Remote Workers
Very Low (0%–29%)	Low (30%–54%)	Medium (55%–74%)	High (75%–100%)
60%	31%	5%	4%

LOB

Industry Top 5
MFG	Government	Education	Construction	Retail
18%	9%	8%	7%	6%

Job Level
Executive	Director	Manager	Other
29%	11%	38%	21%

Company Size
Mid-Market* 44% — Enterprise* 56%

Remote Workers
Very Low (0%–29%)	Low (30%–54%)	Medium (55%–74%)	High (75%–100%)
65%	27%	4%	5%

*Mid-market (US: 100–999 employees/All Other Markets: 100–499 employees); Enterprise (US: 1000+ employees/All Other Markets: 500+ employees)
Base – All: Total (1420); ITDM (692); LOB (728)

Respondent Profile

DECISION INVOLVEMENT

Total

Evaluating Products, Services or Solutions	62
Determining the Business Need for Products, Solutions and Services	51
Determining the Technology Need for Products, Solutions and Services	51
Determining the Features Needed for Products, Solutions and Services	51
Setting the Overall Strategy and Direction	47
Specifying or Selecting Brands or Vendors	45
Giving Final Authorization or Approval of Purchase	38

ITDM

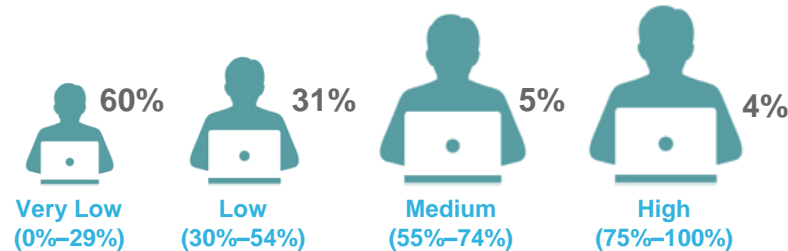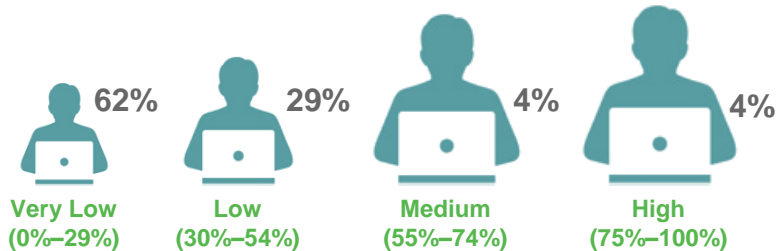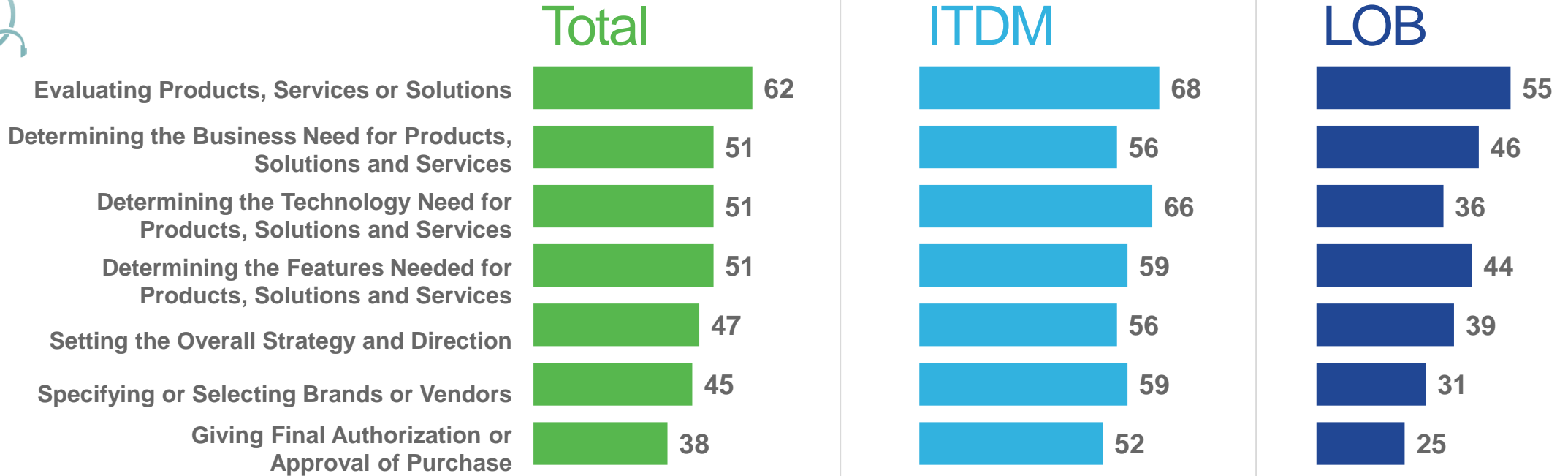|	
Evaluating Products, Services or Solutions	68
Determining the Business Need	56
Determining the Technology Need	66
Determining the Features Needed	59
Setting the Overall Strategy and Direction	56
Specifying or Selecting Brands or Vendors	59
Giving Final Authorization	52

LOB

Evaluating Products, Services or Solutions	55
Determining the Business Need	46
Determining the Technology Need	36
Determining the Features Needed	44
Setting the Overall Strategy and Direction	39
Specifying or Selecting Brands or Vendors	31
Giving Final Authorization	25

ACCESS SOLUTIONS

Total

Corp. Network via WIFI	Mobile VPN	Mobile Access to Cloud	Corp. Network via Wi-Fi/ Hotspots
73%	59%	59%	59%

ITDM

Corp. Network via WIFI	Mobile VPN	Mobile Access to Cloud	Corp. Network via Wi-Fi/ Hotspots
75%	68%	66%	64%

LOB

Corp. Network via WIFI	Mobile Access to Cloud	Corp. Network via Wi-Fi/ Hotspots	Mobile VPN
72%	53%	53%	50%

Base – All: Total (1420); ITDM (692); LOB (728)

Mobility Implementation Outcomes

	Worldwide			APJ			Greater China		
	WW			**APJ**			**China**		
	Total	MM	ENT	Total	MM	ENT	Total	MM	ENT
		A	*B*		*A*	*B*		*A*	*B*
Base – Asked	(728)	(321)	(407)	(268)	(109)	(159)	(50)	(25)	(25)
EFFECTS OF IMPLEMENTATION ON MOBILE DEVICES AND APPS								*	*
Are changing the way we communicate and collaborate	66	62	69	62	52	68 A	80	*	*
Are changing the way our employees work	62	58	64	59	54	63	70	*	*
Are changing the way in which we engage with customers	56	54	57	51	49	53	76	*	*
Are changing our business processes	49	50	48	51	50	51	48	*	*
Are causing us to change the portfolio of services and products we offer	32	29	35	31	27	34	44	*	*

L1. What effects are the implementation of mobile devices and applications having on your organization?

Mobility Implementation Outcomes

	Worldwide			EMEAR		
		WW			EMEAR	
	Total	MM	ENT	Total	MM	ENT
		A	B		A	B
Base – Asked	(728)	(321)	(407)	(261)	(128)	(133)
EFFECTS OF IMPLEMENTATION ON MOBILE DEVICES AND APPS						
Are changing the way we communicate and collaborate	66	62	69	66	66	67
Are changing the way our employees work	62	58	64	61	59	62
Are changing the way in which we engage with customers	56	54	57	51	45	56
Are changing our business processes	49	50	48	49	48	51
Are causing us to change the portfolio of services and products we offer	32	29	35	29	28	30

L1. What effects are the implementation of mobile devices and applications having on your organization?

AB – Significantly different at the 95% confidence level.   * Base size under 30 not reported

Overall Views On Mobility

	Worldwide			APJ			Greater China		
	Total	WW MM *A*	ENT *B*	Total	APJ MM *A*	ENT *B*	Total	China MM *A*	ENT *B*
Base – Asked	(728)	(321)	(407)	(268)	(109)	(159)	(50)	(25)	(25)
TOP 2 BOX (STRONGLY AGREE/AGREE)								*	*
Over The Next 10 Years, Mobility Will Impact Our Organization As Much As The World Wide Web Has Over The Last 20 Years	69	67	71	62	56	66	80	*	*
Given The Choice, I Would Prefer To Source My Mobility Services Without IT Intervention	36	36	36	38	37	38	40	*	*
Our Line Of Business Is Able To Accurately Quantify The Success And ROI Of Mobility-Related Projects	50	47	53	44	39	47	70	*	*
Our IT Department Is Able To Deliver The Mobility Services We Need To Be Successful	62	59	65	54	48	59	76	*	*

L3. To what extent do you **agree** or **disagree** that the following statements represent your organization?

Overall Views On Mobility

Worldwide

EMEAR

	Worldwide			EMEAR		
	Total	WW MM *A*	ENT *B*	Total	EMEAR MM *A*	ENT *B*
Base – Asked	*(728)*	*(321)*	*(407)*	*(261)*	*(128)*	*(133)*
TOP 2 BOX (STRONGLY AGREE/AGREE)						
Over The Next 10 Years, Mobility Will Impact Our Organization As Much As The World Wide Web Has Over The Last 20 Years	69	67	71	71	70	71
Given The Choice, I Would Prefer To Source My Mobility Services Without IT Intervention	36	36	36	30	33	28
Our Line Of Business Is Able To Accurately Quantify The Success And ROI Of Mobility-Related Projects	50	47	53	47	39	55 A
Our IT Department Is Able To Deliver The Mobility Services We Need To Be Successful	62	59	65	63	58	68

L3. To what extent do you **agree** or **disagree** that the following statements represent your organization?

Organization's View Of Mobility

	Worldwide			APJ			Greater China		
	Total	WW MM *A*	ENT *B*	Total	APJ MM *A*	ENT *B*	Total	China MM *A*	ENT *B*
Base - Total	(1420)	(573)	(847)	(529)	(198)	(331)	(100)	(50)	(50)
TOP 2 BOX (STRONGLY AGREE/AGREE)									
Enables Employees To Work Anywhere, Anytime On Any Device	83	80	84	78	76	80	91	88	94
Provides New Opportunities For Us To Improve Employee Productivity	82	79	84 A	79	74	82 A	93	96	90
Provides New Ways Of Engaging With Customers	80	79	81	76	74	77	91	86	96
Provides New Ways Of Engaging With Our Partners And Suppliers	78	74	81 A	72	65	76 A	90	84	96
Is A Strategic Imperative For Our Organization's Success	78	77	78	78	78	78	89	92	86
Offers New Revenue Streams By Providing Customers Value-Added Access And Services	71	71	72	68	64	71	80	84	76
Is Managing Our Mobile Environments With Enterprise Mobility Management (EMM)	67	64	69	66	62	69	83	84	82

C1. To what extent do you **agree or disagree** that the following statements represent your organization's view of mobility?

AB – Significantly different at the 95% confidence level.   * Base size under 30 not reported

Organization's View Of Mobility

	Worldwide			EMEAR		
	Total	WW MM *A*	ENT *B*	Total	EMEAR MM *A*	ENT *B*
Base - Total	(1420)	(573)	(847)	(491)	(215)	(276)
TOP 2 BOX (STRONGLY AGREE/AGREE)						
Enables Employees To Work Anywhere, Anytime On Any Device	83	80	84	83	80	85
Provides New Opportunities For Us To Improve Employee Productivity	82	79	84 A	81	78	83
Provides New Ways Of Engaging With Customers	80	79	81	79	78	80
Provides New Ways Of Engaging With Our Partners And Suppliers	78	74	81 A	78	75	80
Is A Strategic Imperative For Our Organization's Success	78	77	78	72	69	74
Offers New Revenue Streams By Providing Customers Value-Added Access And Services	71	71	72	67	69	66
Is Managing Our Mobile Environments With Enterprise Mobility Management (EMM)	67	64	69	61	59	63

C1. To what extent do you **agree or disagree** that the following statements represent your organization's view of mobility?

Benefits Realized Or Expected Through Implementation of Mobility Solutions

	Worldwide			APJ			Greater China		
	Total	WW MM *A*	ENT *B*	Total	APJ MM *A*	ENT *B*	Total	China MM *A*	ENT *B*
Base - Total	*(1420)*	*(573)*	*(847)*	*(529)*	*(198)*	*(331)*	*(100)*	*(50)*	*(50)*
Increase employee productivity	59	57	60	58	56	60	74	72	76
Improve customer service and satisfaction	50	48	51	49	43	52	69	66	72
Increase employee satisfaction	42	41	42	43	38	46	45	46	44
Reduce travel expenses	40	35	43 A	39	33	43 A	45	38	52
Increase sales revenue	38	37	39	40	39	40	41	30	52 A
Improve retention of quality employees	34	32	35	33	28	37	35	30	40
Produce new revenue streams	32	32	32	34	32	35	35	36	34
Create a distributed employee-base	28	27	28	31	29	31	39	38	40
Increase brand loyalty	26	23	29 A	31	24	35 A	34	40	28
Reduce real-estate costs	22	21	23	22	18	24	23	24	22

C4. Which of the following business benefits has your organization realized or would expect to realize, through implementing its mobility solutions?

Benefits Realized Or Expected Through Implementation of Mobility Solutions

Worldwide

EMEAR

	Total	WW MM A	ENT B	Total	EMEAR MM A	ENT B
Base - Total	(1420)	(573)	(847)	(491)	(215)	(276)
Increase employee productivity	59	57	60	56	53	59
Improve customer service and satisfaction	50	48	51	45	45	46
Increase employee satisfaction	42	41	42	39	37	41
Reduce travel expenses	40	35	43 A	39	35	41
Increase sales revenue	38	37	39	34	36	33
Improve retention of quality employees	34	32	35	33	31	34
Produce new revenue streams	32	32	32	28	30	27
Create a distributed employee-base	28	27	28	23	22	24
Increase brand loyalty	26	23	29 A	19	15	21
Reduce real-estate costs	22	21	23	21	22	21

C4. Which of the following business benefits has your organization realized or would expect to realize, through implementing its mobility solutions?

Benefits Realized Or Expected Through Implementation of B2C Mobility Initiatives

	Worldwide			APJ			Greater China		
	Total	WW MM *A*	ENT *B*	Total	APJ MM *A*	ENT *B*	Total	China MM *A*	ENT *B*
Base - Asked	(1378)	(560)	(818)	(511)	(193)	(318)	(100)	(50)	(50)
Increase customer satisfaction	51	49	52	50	48	52	62	58	66
Increase customer loyalty	40	37	41	40	33	44 A	45	44	46
Engage/capture new customers	39	38	39	41	38	42	52	60	44
Improve brand recognition	36	36	36	38	36	40	52	50	54
Enable new product/service offerings	36	35	37	39	35	41	44	44	44
Improve brand reputation	35	33	36	36	31	40 A	52	50	54
Increase revenue per customer	32	30	33	34	34	34	25	24	26
Increase customer mind-share	30	30	31	31	23	36 A	31	38	24
Differentiate customer experience	28	26	29	31	21	36 A	28	28	28
Encourage immediate purchases	27	26	27	29	26	31	28	36	20

C12. Which of the following business benefits has your organization realized or would expect to realize, through its **Business-to-Consumer (B2C)** mobility initiatives?

AB – Significantly different at the 95% confidence level.   * Base size under 30 not reported

Benefits Realized Or Expected Through Implementation of B2C Mobility Initiatives

Worldwide

EMEAR

	Total	WW MM A	ENT B	Total	EMEAR MM A	ENT B
Base - Asked	(1378)	(560)	(818)	(471)	(209)	(262)
Increase customer satisfaction	51	49	52	47	47	47
Increase customer loyalty	40	37	41	36	36	35
Engage/capture new customers	39	38	39	35	34	35
Improve brand recognition	36	36	36	28	29	27
Enable new product/service offerings	36	35	37	31	30	32
Improve brand reputation	35	33	36	31	30	31
Increase revenue per customer	32	30	33	27	25	29
Increase customer mind-share	30	30	31	30	33	27
Differentiate customer experience	28	26	29	22	24	20
Encourage immediate purchases	27	26	27	20	23	18

C12. Which of the following business benefits has your organization realized or would expect to realize, through its **Business-to-Consumer (B2C)** mobility initiatives?

Wireless Direction Over Next 12-24 Months

	Worldwide			APJ			Greater China		
	Total	WW MM *A*	ENT *B*	Total	APJ MM *A*	ENT *B*	Total	China MM *A*	ENT *B*
Base - Asked	(692)	(252)	(440)	(261)	(89)	(172)	(50)	(25)	(25)
Our organization has or is transitioning towards all-wireless access networks.	36	34	38	37	42	34	34	*	*
Our organization will support both wired and wireless access networks for the foreseeable future.	59	61	58	60	54	63	64	*	*
Our organization will continue to only provide wired access to the network. Wireless connectivity is not and will not be available for the foreseeable future.	3	4	3	2	2	2	2	*	*

IT2. Which statement best describes your organization's wireless direction over the next **12 to 24 months**?

Wireless Direction Over Next 12-24 Months

<table>
<tr><th></th><th colspan="3">Worldwide 🌐</th><th colspan="3">EMEAR 🇬🇧 🇩🇪 🇫🇷 🇳🇱 🇷🇺</th></tr>
<tr><th></th><th>Total</th><th>WW MM
A</th><th>ENT
B</th><th>Total</th><th>EMEAR MM
A</th><th>ENT
B</th></tr>
<tr><td>Base - Asked</td><td>(692)</td><td>(252)</td><td>(440)</td><td>(230)</td><td>(87)</td><td>(143)</td></tr>
<tr><td>Our organization has or is transitioning towards all-wireless access networks.</td><td>36</td><td>34</td><td>38</td><td>26</td><td>28</td><td>25</td></tr>
<tr><td>Our organization will support both wired and wireless access networks for the foreseeable future.</td><td>59</td><td>61</td><td>58</td><td>67</td><td>67</td><td>67</td></tr>
<tr><td>Our organization will continue to only provide wired access to the network. Wireless connectivity is not and will not be available for the foreseeable future.</td><td>3</td><td>4</td><td>3</td><td>5</td><td>5</td><td>6</td></tr>
</table>

IT2. Which statement best describes your organization's wireless direction over the next **12 to 24 months**?

Implementation Status Of Gigabit WLAN

	Worldwide			APJ			Greater China		
	Total	WW MM *A*	ENT *B*	Total	APJ MM *A*	ENT *B*	Total	China MM *A*	ENT *B*
Base - Asked	(662)	(240)	(422)	(253)	(85)	(168)	(49)	(24)	(25)
Currently deployed in production	25	23	27	25	27	24	22	*	*
Currently licensed/starting to deploy	30	32	29	33	32	33	45	*	*
Currently evaluating with plans to implement (proof of concept, pilot)	29	30	28	34	35	33	22	*	*
Completed evaluation, but have no current plans to implement	4	4	4	2	-	2	4	*	*
No current plans to implement or evaluate	9	10	8	5	6	4	6	*	*

IT4. Which of the following best describes your organization's implementation of Gigabit (.11ac) WLAN?

Implementation Status Of Gigabit WLAN

Worldwide

EMEAR

	Total	WW MM *A*	ENT *B*	Total	EMEAR MM *A*	ENT *B*
Base - Asked	(662)	(240)	(422)	(214)	(82)	(132)
Currently deployed in production	25	23	27	21	17	24
Currently licensed/starting to deploy	30	32	29	25	33 B	20
Currently evaluating with plans to implement (proof of concept, pilot)	29	30	28	28	26	29
Completed evaluation, but have no current plans to implement	4	4	4	7	5	8
No current plans to implement or evaluate	9	10	8	15	18	13

IT4. Which of the following best describes your organization's implementation of Gigabit (.11ac) WLAN?